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FINANCIAL PLANNING STANDARDS BOARD

Are you
ready
for a
**Global
Financial
Career**



FPSB® Integrated Financial Planning course



**FPSB® Investment
Planning Specialist**



**FPSB® Retirement &
Tax Planning Specialist**



**FPSB® Risk & Estate
Planning Specialist**

IIFC is a Premier Education Provider of FPSB US for CFP Coaching In India

Mr. Harminder Garg CFP^{CM} is a Founder & Chief Mentor in IIFC. He has worked in the corporate sector for 18 years in leading brands like ICICI, HDFC & FPSB India. His sales & academics blended experience help him to guide students on a practical case study-based approach. 353+ candidates passed CFP Certification under his guidance with a success strike ratio of 71%.



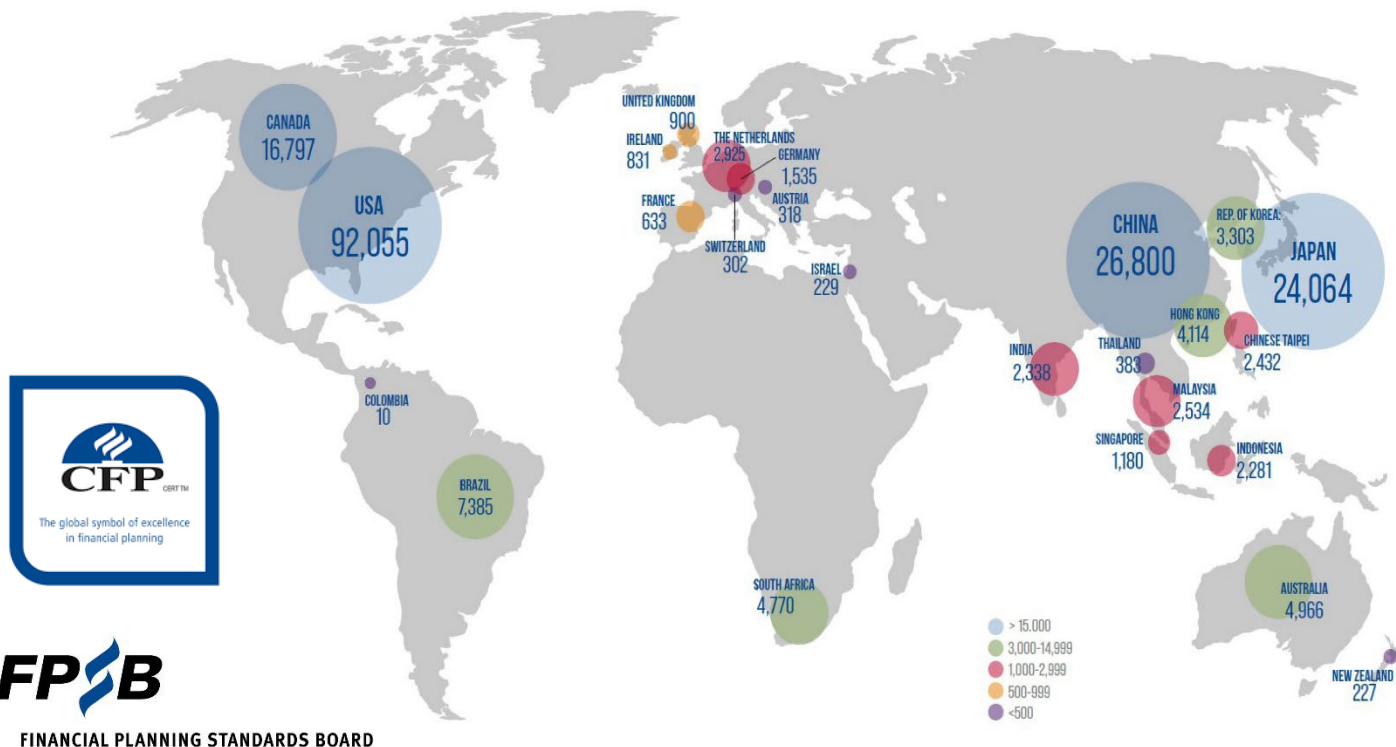
He has cleared the CFP Certification in the year 2007. He has done Executive PGDM in finance from IMT Ghaziabad, PG in Financial Advising from IIBF, and NISM Investment Advisor Level 1 (XA) & NISM Advisor Level 2 (XB) and Retirement Advisor Module. All Sessions of this module will be conducted by Mr. Harminder Garg CFP^{CM}.

IIFC is a ISO 21001 Certified for Educational Organization from IAF

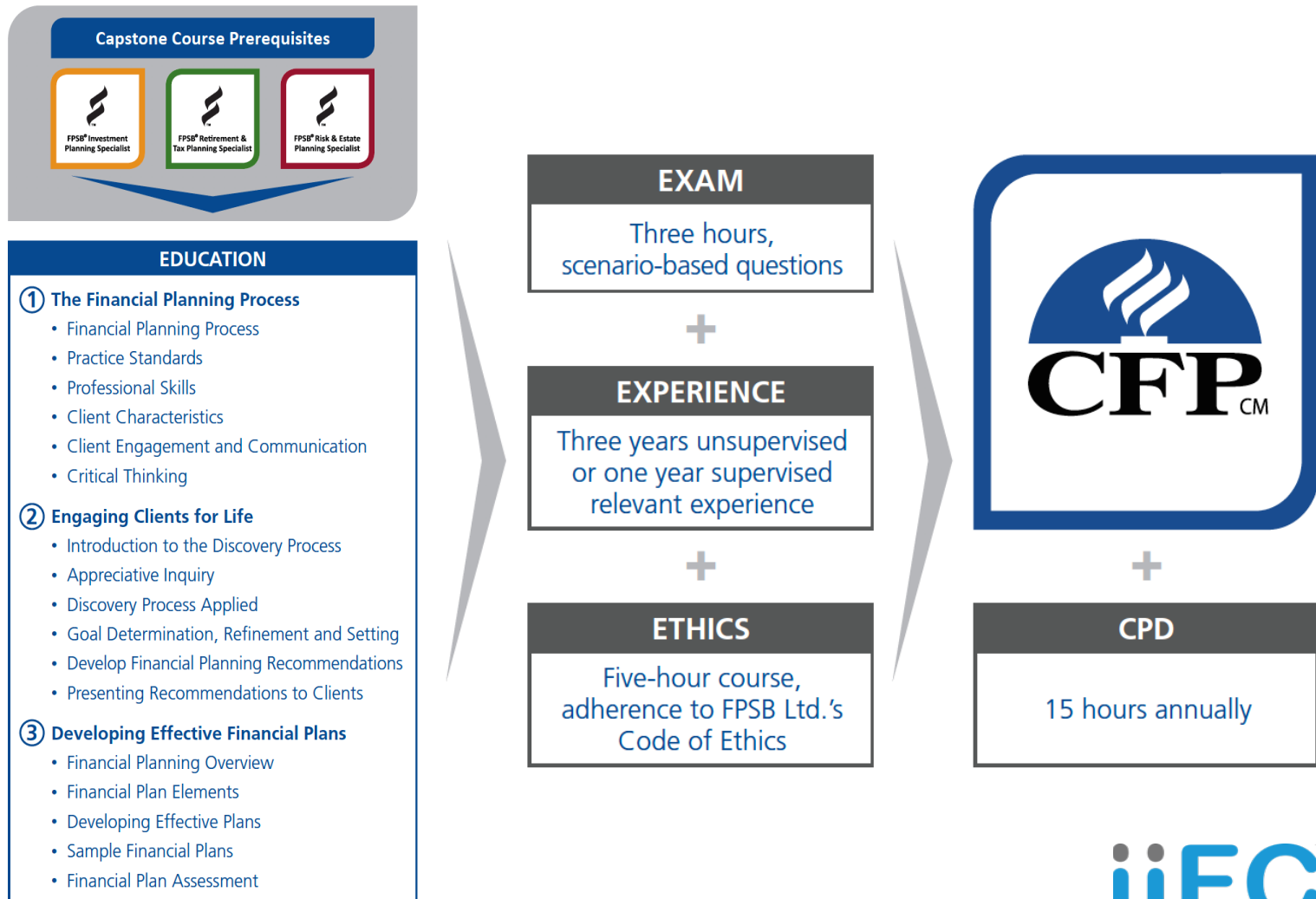


2,23,770 CFP Professionals Worldwide in 27 Territories

CFP Professionals by Territory



CERTIFIED FINANCIAL PLANNER^{CM} Certification



How is then a candidate advanced to write the CFP exam?

- The culmination of Integrated Financial Planning course lies in a candidate constructing a hypothetical financial plan and submitting the same to FPSB for assessment. It is only after a successful assessment of the submitted financial plan that a candidate is advanced to write the CFP exam.

FPSB will allocate Mentor to every Student in last module who is a expert the Financial Advisory & Mentor is guiding you on practical aspects of Financial Advisory



Modules Covered in CFP Program



In CFP Final Exam – There is a one case study and from that case study 25 Multiple choice questions will be asked. These 25 questions is from six components of Financial Planning, viz. Risk Management and Insurance Planning, Estate Planning, Investment Planning and Asset Management, Retirement Planning, Tax Planning, and Personal Financial Management.

Experience

3 Year Experience in Financial Services Industry

Such experience shall be in one of the following broad job activities

- (a) Funds Management or Investment Advice
- (b) Accounts or Auditing
- (c) Corporate Finance
- (d) Customer Interface/Relationship/Investor Service
- (e) Academics

Fast track Pathway – In Brief

Professionals in Financial services having Specified

- (a) Education Qualification (details given in next slide), and
- (b) Relevant three years work experience

Would be eligible to register, upon verification of their credentials, in the FPSB Integrated Financial Planning course (CFP Final – 4th Level)

Once registered for the IFP (CFP Final – 4th Level) course, every Fast track pathway candidate shall be at par with a regular candidate and shall follow the same pattern of Education, examination and certification to qualify CFP Final Case study Project & Exam.

Eligibility for Fast track Pathway (Any One)

- MBA or PGDM from an AICTE approved Institute
- MA Economics or Master of Commerce (M Com)
- Chartered Accountant, from ICAI India or ACCA or CA Inter with 3 years Articleship
- CFA, USA or AICPA (USA) or CMA or ACCA
- Advanced Wealth Management Course or CAIIB, from IIBF
- Post – Graduate Certificate program in Finance, PGDFM or other equivalent courses offered by IIM
- Fellow member of Insurance Institute of India (LI/GI)

FPSB Fee for Fast track Pathway

FPSB Registration Fee

- Rs. 5000- Document Verification Fee
- 34000 - (Including Online Material Access Fee for All Modules)

FPSB Financial Plan Assessment fee & Exam Fee

- Financial Plan review fee – Rs. 10,500
- CFP Final Exam fee – Rs. 13,000

IIFC Fast track pathway coaching fee - Rs. 35K

CFP Challenge pathway Course IIFC & FPSB Payment Plan in Rs.

IIFC fee on registration to dispatch study material	1 June 2024 - CFP Coaching Fee 1st Installment	1st Aug 2024 - CFP Coaching Fee 2nd Installment	1st Sept 2024 - FPSB Doc Verification fee	15th Sept 2024 - FPSB Reg. Fee	1st Oct 2024 - FP Review Fee & CFP Final Exam Fee	Total
2,000	15,500	17,500	5,000	34,000	23,500	97,500

Virtual Classes for Fast track Pathway

Time Value of Money – Goal Planning 5 sessions (Evening)

*Tue & Sat 8 pm to 9.30 pm
4th June, 8th June, 11th June, 15th June & 18th June*

16 Live Sessions on Concept Building of Financial Planning Components
Income Tax, Estate Planning, Risk Planning, Retirement Planning and Investment Planning

*Tue & Sat 8 pm to 9.30 pm evening
Starting from 25th June 2024 till 20th August 2024.*

Live sessions on CFP Final Exam -
Exam date Exam date 22nd Oct 2024

25th August 2024 to 20th Oct 2024
➤ *Sunday 3 pm to 4.30 pm*
➤ *Thursday 8 pm to 9.30 pm*

Live Financial Plan Preparation Sessions

3rd Nov 2024 to 8th Dec 2024
➤ *Sunday 3 pm to 4.30 pm*
➤ *Thursday 8 pm to 9.30 pm*

New Batch is going to start from 4th June 2024

IIFC Learning Portal

Online Tests

Weekly Online tests

Study Material

We will send Module wise Study Material Courier to you

Recording of Sessions

We will give access of IIFC learning portal to watch recorded session multiple times



GROW. LEAD.
EMPOWER.
SET YOURSELF APART

IIFC is now awarded as a Premium Education Provider out of 20 FPSB Education Providers in India

THIS IS TO CERTIFY THAT


Indian Institute for Financial Certifications (IIFC)

has been approved as a Premium Education Provider
for the CFP® certification program in India by
FPSB India

CERTIFICATE VALID UNTIL: March 31, 2025



Dante De Gori Chief Executive Officer
FINANCIAL PLANNING STANDARDS BOARDS LTD



KRISHAN MISHRA Chief Executive Officer
FPSB INDIA



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IIFC™
INDIAN INSTITUTE FOR
FINANCIAL CERTIFICATIONS

Convocation Ceremony at Delhi with FPSB Global CEO Mr. Noel Maye



IIFC is a FPSB US Authorized Education Provider for CFP Certification Program in India

37 NEW CFP'S QUALIFIED in April 2023 through IIFC Coaching



Harminder Garg CFP^{CM}
Founder & Chief Mentor



BY THIS ADDITION,
TOTAL 273 CANDIDATES QUALIFIED
THROUGH IIFC COACHING

81% 37 out of 46 Candidates passed
CFP Final Exam in the first attempt in April 2023

Congrats!

 AKASH CHATTERJEE Sr. Partner- Golden Arrow Global LLP, Kolkata	 ANANT HARICHANDAN Manager - HDFC AMC, Mumbai	 ANMOL KUMAR GUPTA MFD - AKG Financial, Jammu	 BARKHA JAIN RM - ICICI Pru MF, VADODARA	 CA BIRINDER JOLLY Chandigarh	 DEBIDATTA DASH Wealth Specialist - Axis Bank, Bhubaneswar	 DHRUTI SHAH Content Writer - Skillspire, Ahmedabad
 DIKSHA SETHI Partner - V2U Financials, Faridabad	 FRANKY N FERNANDES Financial wellness Coach, Hyderabad	 K C PATTNAIK BM - Franklin Templeton MF, Guwahati	 KAJALKUMAR ROY Founder - IntelliQa Academy, Vadodara	 MEETIKA ARORA Chief Manager HDFC MF, Gurgaon	 NISHIKANT LOHE MFD & AP Matlial Oswal, Pune	 NITHIN JOY BM - HDFC AMC, Kerala
 PRAGATHI R. ARCOT MT - Shree Sidvin Financial Services, Bangalore	 PRASHANT VJAYKUMAR Consultant - Genpac, Pune	 PRITI BHANUSHALI Accountant-Spectrum Prints, Mumbai	 ROHIT KOTWAL Partner - Burgundy Private, Axis Bank, Ludhiana	Congrats!		
 SAMMED TIRTHARAJ KHOT Sr. Auditor -S & T Ass., Pune	 SHAILLY SETHI Founder -12 Months, Varanasi	 SHAINA GULATI Co-Founder - Bodhi Tree Wealth, Chandigarh	 SHILPA GOLE Founder - NerdyBird Financial Wellness, Ahmedabad			
 SHIVAM NIGAM RM - ABSLMF, Mumbai	 SUJIT SADANGI TM - TATA AIA Life, Pune	 SUNEEL DUTT Chief Manager - PNB, Chandigarh				
 SURABHI RAVINDRAN AVP - WhiteOak Capital AMC, Hyderabad	 TANUSHRI SINGH RM - Bajaj Capital Ltd, Gurgaon	 UTKARSH GARG Ass. Manager - WhiteOak Capital AMC, Hyderabad	 VARUN ARORA Sr. Manager HDFC MF, Amritsar			



Harminder Garg CFP^{CM}
Found & Chief Mentor

85% 37 out of 44
CANDIDATES PASSED
CFP Financial Plan Assessment
Project in the first attempt in
March 2023

 Akash Chatterjee	 Anmol Gupta	 Anoop Sood	 Brinder S Jolly	 Barkha Jain
 Dharmveer Sachan	 Dhruvi Shah	 Diksha Sethi	 Debidatta Dash	 Franky N Fernandes
 K C Pattnaik	 Kajalkumar Roy	 Manoj Yadav	 Mayuri Shrivastava	 Meetika Arora
 Mitesh Yajurvedi	 Nithin Joy	 Payal Ray	 Poornima V	 Pragathi R. Arcot
 Rohit Kotwal	 Sanjay Kumar	 Shally Sethi	 Shaina Gulati	 Shane Arora
 Shilpa Gole	 Suneel Dutt	 Surabhi R	 Tarang Pal	 Utkarsh Garg
 Varun Arora	 Vishal R	 Vishal Shrivastava	 Vivek Singh	 Yagyesh Dwivedi

Congratulations

9 out of 10 Challenge pathway Candidates passed CFP Financial Plan Assessment Project in the first attempt in March 2023

New Batch is going to start from 7th April 2023

Please register on above link for 1-hour free online session on CFP Certification

Call us on
82838-42598
harminder.garg@iifcedu.in
www.iifcedu.in



Challenge Pathway



23 out of **65** candidates passed

CFP Exam through Challenge Status pathway



Rahul Daga
Chief Manager
PNB, Mumbai



Manu Vishal
VP - Axis Bank
Ahmedabad



Ankit Patel
Investment Officer
SBI Wealth, Ahmedabad



Sanjay Kumar
DGM - SBI
Chandigarh



Poornima V
VP - 360 Wealth
Bangalore



Manisha Pattnaik
Ass. Manager - HDFC AMC
Cuttack



Nipun Dhariwal
DM - ICICI Pru MF
Indore



Sunita Chourasia
NRI RM - HDFC Bank
Bangalore



Prashanth Kumar A
BA - MOFSL
Bangalore



Chetan Reliawala
MFD
Surat



Shantanu Shrivastava
VP - Axis Bank
Pune



Sanjeev Sharma
Co-Founder - Sqrrl
Fintech, Gurugram

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Challenge Pathway



“IF you prioritize knowledge and intelligence money will continue to come” - Wilson Law



Pradeep Maithani
AVP - Axis Bank Ltd.
Shimla



Sushant Bandewar
WM - Phillip Capital India
Navi Mumbai



Prameela Nippani
SSM - Franklin Templeton
Hyderabad



Amit Yadav
Ass. Manager-HDFC AMC
Varanasi



Vinay Chaudhary
Financial Planner
Indore



Gurpreet Kaur
Manager - Axis Bank Ltd.
Ludhiana



Sameer Divekar
Ops Head - Dolat Capital Market
Pvt. Ltd., Mumbai



Gaurav Kumar Gupta
Director - HMG Capital
Services, Delhi



Satyajeet Das
BH - Solidarity
Investments, Pune



Raghupreet S Kanwar
Founder - Bright Wealth Ideas
Hyderabad



Sumit Goyal
Chief Manager
Axis Securities, Mumbai

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IFA's



Independent Financial Advisor's/Business Owners upgraded their skill set by passing CFP Certification Exam in Oct 2023



Sachin Garg
Partner-GPS Financial Services, Bathinda



Bharat Bahl
Founder, Immaculate Trainers, Amritsar



CP Joshi
Founder & CEO Cortizen Business Services LLP, Faridabad



Deepak Soni
MFD Indore



Vishal Khurana
MFD GRD Financial Services



CA Dimple Paras Momaya
Prop - D.P. Momaya & Co. Sangli



Manmeet Kaur
Financial Consultant Gurugram



Ravinder Kumar
Partner-BDS Financials Services & Risk Management, Amritsar



Bhasker Tiwari
Director-Univesto Capital, Mumbai



Anand Kumar
Independent Advisor Bangalore



Puneet Chandra
MD- Sivana Insurance Brokers, Delhi



Harsh Gupta
Director - GKG Investments, Delhi



Nivedita Garg
Co-Founder-Nile Investment Services, Ludhiana



Anusha C K
MFD - Ancaps Finserve, Bangalore



Mrigank Gupta
Founder-Dhan Prabhaaar Pvt. Ltd., Noida

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Wealth Managers



Clients want Qualified Wealth Manager who can generate Advisor's Alpha

Relationship Managers passed CFP Exam in October 2023



Adarsh Nath
RM - HDFC AMC Patiala



Priyanka Tickoo
Key Account Manager Bajaj AMC, Delhi



Jaspreet Singh
Manager-Whiteoak Capital AMC, Delhi



Avani Shah
WM - Ocean Finvest Ahmedabad



Vinod Kumar Karra
ASM - Whiteoak Capital AMC, Hyderabad



Udit Sharma
NRI RM - HDFC Bank New Delhi



CA Shreya Ranka
BA - RevGurus Info India Indore



Jaydeep Jariwala
Manager - Whiteoak Capital AMC, Surat



Gazal Harlalka
IC - Motilal Oswal Private Wealth, Bangalore



Rahul Singh
Domain Expert - TCS Kolkata



Adya Sanket Ray
Ass. Director - HDFC PBG Bangalore



Pankaj Kumar
Manager - UTI MF Kolkata

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IIFC – Premier Education Provider of FPSB US



Harminder Garg CFP®
Founder & Chief Mentor - IIFC

65

CANDIDATES

Passed CFP Exam with a success strike ratio of 75%

In October 2023 through IIFC Coaching till date 303 candidates passed CFP Exam under guidance of CFP Certification Mentor Harminder Garg

82838-42598

harminder.garg@iifcedu.in www.iifcedu.in



Team Leaders



“Only the people who take learning, growth and skill development into their own hands will be tomorrow’s leaders”

Team Managers Working in BFSI sector passed CFP Exam in Oct 2023 to guide & nurture team members and Channel partners in a more effective way



Ramya Udayan
ZSH - South Indian Bank, Kerala



Abhishek Chatterjee
Team Head-ICICI Securities PWM, Mumbai



Pankil Thakkar
Sr. VP - PGIM India MF Ahmedabad



Amruta Tipnis
AVP - Multi-Act Mumbai



Shivani Mathur
BM - IndusInd Bank Gurgaon



Chetan Mehta
BM-Franklin Templeton AMC Senior Branch Manager Rajkot



Devesh Srivastava
VP - Axis Bank Mumbai



Prateek Mittal
RH-ICICI Bank Regional Head, Hyderabad



Pranay Chadha
Sr. AVP & Cluster Head Bajaj Capital Ltd, New Delhi



Sunil Kumar Pandey
Sr. Manager - HDFC MF Haldwani



Arghya Duttgupta
BH - Corporate & Institutions HDFC AMC Ltd, Mumbai

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Thank You

